

ROBERT SMITH

Commercial Insurance Producer

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As a Commercial Insurance Producer, developed and promoted strong relationships with prospects and clients. Achieved pre-determined sales goals. Identified and develops insurance prospects and appropriate markets.

EXPERIENCE

Commercial Insurance Producer

ABC Corporation - OCTOBER 2000 - APRIL 2003

- Developed, followed, and achieved sales objectives. Educated clients concerning agency payment expectations and cancellation procedures.
- Asked for referrals from insureds to help generate new business. Explained coverages and exclusions and documents explanations in the Agency Management System for future reference.
- Developed a book of business that is profitable for both the agency and carriers. Worked with clients to ensure limit and coverage adequacy.
- Provided needed information and clarifications about clients to company personnel, and documents system by transaction date. Created letters to clients offering coverage, share information and advice regarding insurance matters. Used these to round out accounts fully.
- Worked with Accounts team, reviews existing policy coverages in order to upgrade accounts and remarket if necessary.
- Assisted service staff in collecting client information in preparation of schedules of insurance, summaries and renewal proposals. Reviewed appropriate policy change requests and other account activity.
- Documented automated file as appropriate. Used each client contact as an opportunity for coverage review and marketing of need covered.

Commercial Insurance Producer

Delta Corporation - 1998 - 2000

- Must conduct phone prospecting, face-to-face prospecting and through social media efforts.
- Conduct sales presentation with the intent of selling an insurance product.
- Provide claim assistance to clients.
- Solicit referrals from clients.
- Must be licensed in the state.
- Maintain Errors & Omissions Insurance.
- Ability to pass a background check.



EDUCATION

- BBA
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SKILLS

Communication, Interpersonal.